6/8/88 R9375-1

Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

April 1988 Volume 17, Number 4

Vacation Travel Will Increase Again This Summer

Summer vacation travel, already at astronomical heights, will rise another 3 percent this year, predicts the US Travel Data Center's latest report, the 1988 SUMMER VACATION TRAVEL FORECAST.

The summer vacation travel forecast, unveiled at a press conference in Washington, D.C., on May 11, projects Americans will log 305 million vacation person-trips and, averaging 6 nights on each trip, spend over 1.8 billion nights away from home on vacation in June, July and August 1988. (A person-trip measures anyone traveling 100 miles or more away from home.)

The forecast, based upon interviews in March and April with 6,000 randomly selected U. S. adult residents, shows 83 percent of summer vacationers will travel by auto/truck/RV and 13 percent by air.

"The combination of stable prices and economic indicators countering fears of an economic downturn; increased employment levels coupled with the lowest unemployment rate since 1979; and high optimism among consumers creates the positive environment for increased vacation travel this summer," said Data Center Director Dr. Suzanne Cook. The Midwest and Great Lakes regions will generate the greatest increase in vacation travelers this summer.

The 50-page 1988 SUMMER VACATION TRAVEL FORECAST is being sent to all Data Center full members and is available to limited members and others for $65 prepaid from the US Travel Data Center, Two Lafayette Centre, 1133 21st Street, N.W., Washington, D.C. 20036.##

Send For Free Guide

The 1988 GUIDE TO PROGRAMS, MEMBERSHIP AND PUBLICATIONS of the US Travel Data Center, commemorating 15 years of service to the travel industry, will be released early next month. The guide is free and describes several new research programs, publications and membership benefits offered in the coming year.

Among the new publications are further studies of business travelers and foreign travelers, an expanded and more useful monthly newsletter, and two new series reporting the results of the 1988 National Travel Survey.

The Data Center will release this June the 1987 SURVEY OF BUSINESS TRAVELERS, the newest report of the Business Travel Survey series, which will cover segments of the business travel market in

(continued on page 3)

Lodging Leads January & February Travel Price Increases

A significant rise in the cost of lodging, unmitigated by declines in the price of motor fuel and airline fares, spurred a 1.3 percent increase in the cost of travel between the end of December 1987 and the end of February 1988, according to the US Travel Data Center's Travel Price Index (TPI).

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, climbed to 116.6 (1982-1984 = 100) in January and rose again slightly to 116.7 in February. ##

Monthly and Annual Rates of Change in the Travel Price Index and Components
January 1988

TPI Component	Monthly Percent Change December 1987 to September 1987	Annual Percent Change September 1986 to September 1987
Transportation	0.1	12.3
Airline Fares	0.6	5.7
Other Intercity Trans.	0.6	1.7
Intracity Public Trans.	0.2	2.2
Motor Fuel	-0.3	17.4
Lodging	-2.7	5.4
Food and Beverages Away From Home	0.4	3.9
Entertainment	1.1	2.9
TRAVEL PRICE INDEX	-0.6	7.0
CONSUMER PRICE INDEX	0.5	4.3

February 1988

TPI Component	Monthly Percent Change January 1988 to February 1988	Annual Percent Change February 1987 to February 1988
Transportation	-1.6	1.4
Airline Fares	-1.4	-1.0
Other Intercity Trans.	0.2	2.4
Intracity Public Trans.	0.2	2.2
Motor Fuel	-1.8	3.0
Lodging	0.9	6.3
Food and Beverages Away From Home	0.3	3.7
Entertainment	0.1	7.0
TRAVEL PRICE INDEX	0.1	4.0
CONSUMER PRICE INDEX	0.3	3.9

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street NW, Washington, D.C. 20036. Telephone: 202/293-1040. Suzanne D. Cook, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on Data Center Projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are $70 per year, U.S., Canada and Mexico; other foreign countries, $80. per year, payable in U.S. funds only.

January Travel Rises 15 Percent

Travel during January increased 15 percent, according to the latest National Travel Survey conducted by the US Travel Data Center.

The monthly telephone survey reported that travelers in January 1988 took 75.2 million person-trips. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

Pleasure travel grew almost 7 percent, surpassed by weekend travel which grew 10 percent.

Business and convention travel rose substantially over year-earlier levels.

Auto/truck/RV travel produced most of the month's increase, while air travel rose over 7 percent compared to last year.

The number of travelers staying in the homes of friends and relatives increased significantly, while those staying in hotels/motels fell 5 percent.

The average trip duration rose slightly from 4.5 nights in January 1987 to 4.9 nights, and the average domestic round-trip distance fell from 980 miles a year ago to 950 miles in January 1988.##

Guide (continued from page 1)

detail.

The 1988 National Travel Survey results will appear in both an overview report and a detailed companion volume of survey tabulations.

"TravelTab 1988" (a quick reference guide to current travel trends) and the 1989 OUTLOOK FOR TRAVEL AND TOURISM are also on the program.

For a free 1988 GUIDE TO PROGRAMS, MEMBERSHIP AND PUBLICATIONS, address requests to the US Travel Data Center, Two Lafayette Centre, 1133 21st Street, N.W., Washington, D.C. 20036, or phone 202/293-1040.##

Visitor Volume at National Parks

Region	JAN 1988 visits	Change from JAN 1987* (percent)	Percent change 1988/1987* Year-to-Date
NEW ENGLAND	262,817	14	14
MIDDLE ATLANTIC	909,347	8	8
SOUTH ATLANTIC	3,285,453	12	12
EAST SOUTH CENTRAL	1,086,641	-6	-6
EAST NORTH CENTRAL	220,212	18	18
WEST NORTH CENTRAL	150,042	-3	-3
WEST SOUTH CENTRAL	345,024	-12	-12
MOUNTAIN	1,089,550	-7	-7
PACIFIC	2,406,103	-9	-9
TOTAL	9,755,189	0	0

* Percent change figures may not be consistent with previously reported visitation totals due to National Park Service revisions.

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **MIDDLE ATLANTIC**: New Jersey, New York, Pennsylvania. **SOUTH ATLANTIC**: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **EAST SOUTH CENTRAL**: Alabama, Kentucky, Mississippi, Tennessee. **EAST NORTH CENTRAL**: Illinois, Indiana, Michigan, Ohio, Wisconsin. **WEST NORTH CENTRAL**: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **WEST SOUTH CENTRAL**: Arkansas, Louisiana, Oklahoma, Texas. **MOUNTAIN**: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **PACIFIC**: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1987/88
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)	Jan	$ 3,883 million	26.6	7.4	7.4
Eating and drinking places(2)	Jan	$12,939 million	-0.9	0.6	0.6
Gasoline service stations(2)	Jan	$ 7,607 million	1.6	11.0	11.0
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Jan	59.0 percent	-7.1	-4.7	-4.7
Real demand for commercial lodging(4)	Jan	47.1 million	11.6	3.4	3.4
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Jan	23.4 billion	-6.0	2.4	2.4
International revenue passenger-miles	Jan	6.3 billion	4.8	24.4	24.4
Highway traffic volume(6)					
Rural arterial vehicle-miles	Jan	33.3 billion	-11.6	6.4	6.4
Rail passenger traffic(7)					
Amtrak passenger-miles	Jan	415.9 million	-15.4	16.1	16.1
Travel Price Index(8)	Jan	116.6	1.2	4.7	4.7
U.S. resident travel(9)					
Total person-trips	Dec	106.2 million	8.9	12.0	6.2
Vacation person-trips	Dec	73.9 million	14.8	10.0	3.1
Total person-nights	Dec	499.1 million	13.7	9.7	4.2
Vacation person-nights	Dec	376.9 million	27.2	2.0	2.3
Public use of national parks(10)					
Visits	Jan	9,755,189	-9.9	0	0
Overnight stays	Jan	379,499	12.0	-13.2	-13.2
Foreign arrivals in U.S.(11)					
From overseas	Dec	856,976	12.9	15.3	17.5
From Canada	Jan	784,508	20.8	7.6	7.6
From Mexico	Dec	78,579	31.5	-3.5	13.9
U.S. citizen departures(12)					
To overseas	Dec	1,325,754	16.4	2.5	26.3
To Canada	Jan	417,944	-23.2	7.3	7.3
Domestic demand for motor gasoline(13)					
Barrels per day	Jan	6,625 thousand	-8.6	2.4	2.4

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. (4) Source: Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) Pre-liminary; unadjusted for differences in reporting units. Source: National Park Service. (11) Source: Statistics Canada and U.S. Travel and Tourism Administration. Mexican data reflect I94 arrivals only. (12) Source: Statistics Canada and Nettleton Research Center. (13) Preliminary; Source: U.S. Department of Energy

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US Travel Data Center

CORRECTION

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Dear Data Center Members and Travel Printout Subscribers:

Correction: The Travel Price Index chart for January, which was included in the April Travel Printout, was printed incorrectly. The corrected version is listed below.

Monthly and Annual Rates of Change in the Travel Price Index and Components
January 1988

TPI Component	Monthly Percent Change December 1987 to January 1988	Annual Percent Change January 1987 to January 1988
Transportation	-1.8	5.7
Airline Fares	-0.6	0.7
Other Intercity Trans.	0.3	1.8
Intracity Public Trans.	0.3	2.4
Motor Fuel	-2.8	9.5
Lodging	4.8	6.0
Food and Beverages Away From Home	0.4	3.6
Entertainment	0.8	7.3
TRAVEL PRICE INDEX	1.2	4.7
CONSUMER PRICE INDEX	0.3	4.0

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

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Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

US Travel Data Center

May 1988 Volume 17, Number 5

U.S. Regions Will Host 113 Million Americans This Summer

An estimated 113 million Americans this year will pursue that favorite summertime vacation activity, travel away from home, and, in the process, log 255 billion miles, according to the US Travel Data Center's 1988 Summer Vacation Travel Forecast.

Summer vacation travel, which last year lured away 46 percent of the population during June, July, and August, will rise another 3 percent this year, predicts the Data Center.

Leading the overall increase in vacation travel this summer, the Midwest and Great Lakes regions will generate nearly 8 percent and 7 percent more vacation travel than last year, respectively.

The Southeast, however, will produce more vacation travel than any other--an estimated 82 million person-trips.

All other regions will produce sizeable and fairly equal shares of vacation travel during the upcoming summer months. (A person-trip is measured each time anyone travels 100 miles or more away from home.)

On the other hand, the West will enjoy the largest increase in visitors this summer, as travel to this region is projected to jump nearly 7 percent to a total of 63 million person-trips, the second largest volume estimated for the five regions.

The Great Lakes should also attract more than the average share of visitors with a projected increase of over 5 percent. (continued on page 4)

New Guide Notes 15th Year

The all new US Travel Data Center's Guide, commemorating 15 years' (1973-1988) service to the travel industry, will be sent to all Data Center members in July.

The new Guide has an all-new format, expanded size, and more detailed explanations of membership benefits. Designed by the Manager of Communications, Ida Simmons, this improved edition stems from results of focus group research conducted last year.

Members will want to keep the Guide handy as a checklist of publications and membership benefits, to order other reports offered by the Data Center, and to keep as a reference when considering custom research.

According to the Guide, several publications will be sent to members in the next three months: Traveltab 1988, the 1987 Survey of Business Travelers, the Impact of Travel on State Economies 1986, and the National Travel Survey report on summer travel in 1987. ##

Lodging Drives Travel Price Increase in March

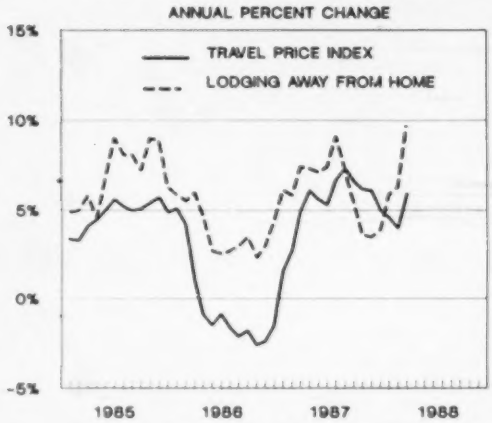
The rising cost of lodging led to a 1.8 percent increase in the overall cost of travel in March, according to the US Travel Data Center's Travel Price Index (TPI).

For comparison, overall consumer goods and services costs, as measured by the Consumer Price Index (CPI), rose 0.4 percent in March.

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, moved up to 118.8 (1982-84=100) in March.

Lodging prices jumped 5.4 percent from February, the third consecutive monthly increase in this component and its largest monthly increase since the inception the Travel Price Index. However, motor fuel prices, falling for the fourth consecutive month, declined 1.0 percent in March.

1988 LODGING PRICES RISE ABOVE OVERALL TRAVEL COSTS



NOTE: TPI AND CPI REVISED JANUARY, 1987; DATA NOT STRICTLY COMPARABLE WITH EARLIER YEARS

The March TPI gained 4.9 percent when compared to the same month one year ago. ##

Monthly and Annual Rates of Change in the Travel Price Index and Components
March 1988

TPI Component	Monthly Percent Change February 1988 to March 1988	Annual Percent Change March 1987 to March 1988
Transportation	-0.3	0.4
Airline Fares	0.7	-0.9
Other Intercity Trans.	0.2	2.9
Intracity Public Trans.	0.0	2.0
Motor Fuel	-1.0	1.2
Lodging	5.4	9.7
Food and Beverages Away From Home	0.4	3.8
Entertainment	0.9	8.0
TRAVEL PRICE INDEX	1.8	4.9
CONSUMER PRICE INDEX	0.4	3.9

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

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February Travel Jumps 10 Percent

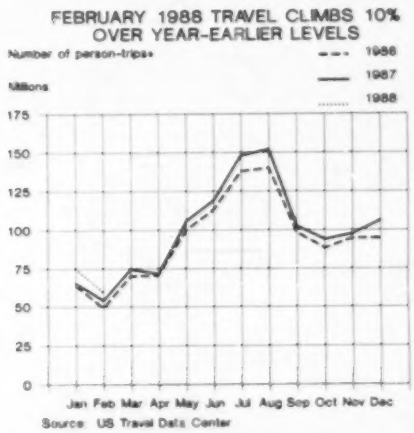
Travel during February rose 10 percent over last year's February travel figures, according to the latest National Travel Survey conducted by the US Travel Data Center.

The monthly telephone survey reported that travelers in February 1988 took 59 million person-trips. (A person-trip is measured each time anyone travels 100 miles or more away from home.)

Vacation travel and travel by auto/truck/RV both posted significant increases, and pleasure travel rose 15 percent. Weekend travel jumped 17 percent over last year.

Travel by air, for business or convention purposes, and involving use of a hotel or motel all dropped, however, below February 1987 levels.

The average trip duration fell slightly from last year's 4.4 nights to 4.1 nights, while the average round trip distance dipped from 980 miles in 1987 to 920 miles in 1988. ##



Announcing new additions to the Data Center staff: Sarah Garrison, economic analyst; Margaret Amein, research analyst; and Julie Bowers, replacing Pat Molella as editorial assistant. ##

Visitor Volume at National Parks

Region	FEB 1988 visits	Change from FEB 1988* (percent)	Percent change 1988/1987* Year-to-Date
NEW ENGLAND	274,352	2	8
MIDDLE ATLANTIC	925,459	-6	1
SOUTH ATLANTIC	3,216,901	18	14
EAST SOUTH CENTRAL	1,195,856	2	-2
EAST NORTH CENTRAL	254,202	21	20
WEST NORTH CENTRAL	177,893	3	-
WEST SOUTH CENTRAL	447,390	-5	-8
MOUNTAIN	1,539,224	11	2
PACIFIC	3,008,031	13	2
TOTAL	11,039,308	9	5

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States comprising the Census regions: **NEW ENGLAND:** Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **MIDDLE ATLANTIC:** New Jersey, New York, Pennsylvania. **SOUTH EAST:** Alabama, Delaware, District of Columbia, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. **EAST NORTH CENTRAL:** Indiana, Illinois, Michigan, Ohio, Wisconsin. **WEST NORTH CENTRAL:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **WEST SOUTH CENTRAL:** Arkansas, Louisiana, Oklahoma, Texas. **MOUNTAIN:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **PACIFIC:** California, Oregon, Washington; As destinations only: Alaska and Hawaii.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1987/86
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)	Feb	$ 4,493 million	19.7	6.7	7.0
Eating and drinking places(2)	Feb	$12,636 million	0.7	2.4	3.0
Gasoline service stations(2)	Feb	$ 8,715 million	-0.4	6.6	8.9
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Feb	60.9 percent	0.0	-1.3	-0.7
Real demand for commercial lodging(4)	Feb	54.5 million	15.6	2.6	3.0
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Feb	23.6 billion	1.1	2.1	2.2
International revenue passenger-miles	Feb	5.2 billion	-16.4	25.9	25.1
Highway traffic volume(6)					
Rural arterial vehicle-miles	Feb	31.8 billion	-3.5	3.9	4.8
Rail passenger traffic(7)					
Amtrak passenger-miles	Feb	375.5 million	-9.7	24.8	20.1
Travel Price Index(8)	Feb	116.7	0.08	4.0	4.3
U.S. resident travel					
Total person-trips (9)	Jan	75.2 million	-29.2	14.8	14.8
Vacation person-trips (9)	Jan	44.0 million	-40.5	19.2	19.2
Total person-nights (10)	Jan	324.3 million	-31.6	14.6	14.6
Vacation person-nights (10)	Jan	215.1 million	-41.2	7.9	7.9
Public use of national parks(11)					
Visits	Feb	11,039,308	13.2	9.0	5.0
Overnight stays	Feb	489,508	29.0	10.0	2.0
Foreign arrivals in U.S.					
From overseas (12)	Jan	780,952	-8.9	27.1	27.1
From Canada (13)	Feb	733,578	-6.5	10.2	8.8
From Mexico (12)	Jan	50,978	-35.1	7.4	7.4
U.S. citizen departures					
To overseas (12)	Jan	943,326	-24.2	3.5	3.5
To Canada (13)	Feb	503,292	20.4	8.1	7.7
Domestic demand for motor gasoline(14)					
Barrels per day	Feb	7,004 thousand	4.9	4.1	3.7

N/A = not available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting week. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 19% arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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